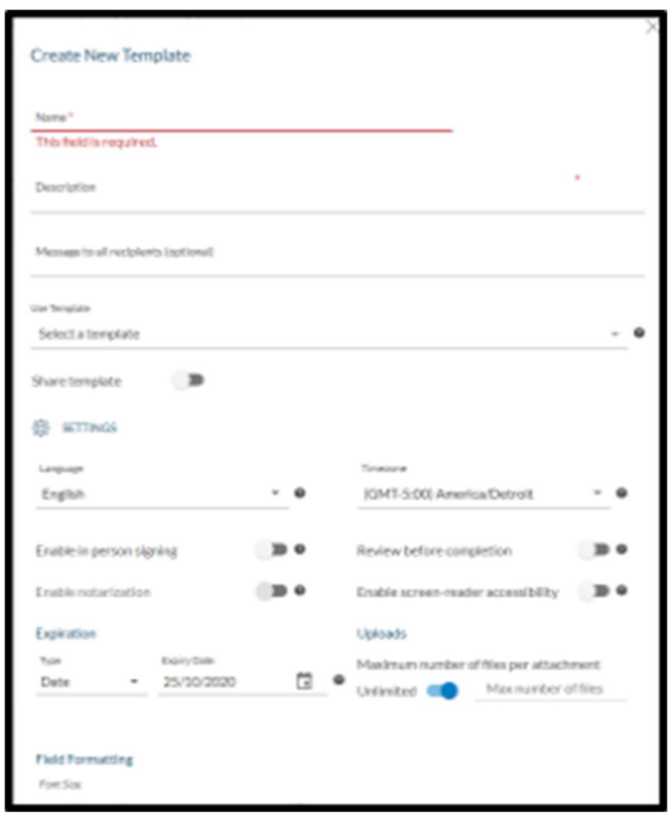
State of Michigan
Records Management Services

eSignature Solution
Tip Sheet: Transaction Templates

Creating a Template
Templates are used to capture settings for a transaction that will be repeated multiple times. They help senders build new transactions quickly. For example, a template could be used to save the recipient settings for a form that contains unique information, but is signed by the same people every time.

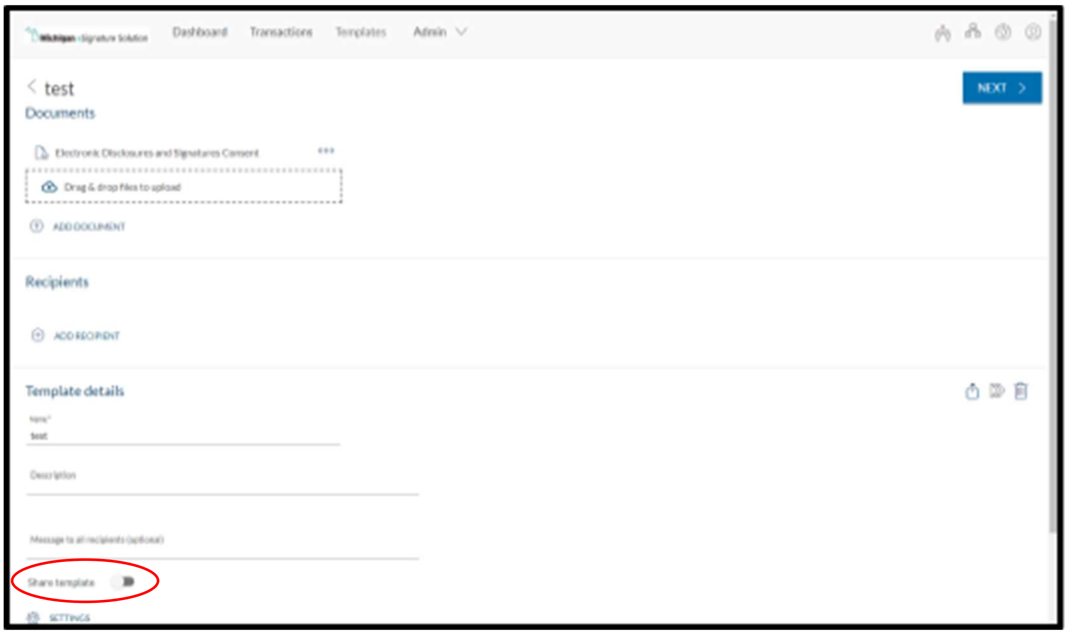
To create an eSignature template, go to the Templates tab in the dashboard. Then, click the New Template button.

The Create New Template screen will open, so you can specify the template settings.



The Template Settings fields and the Transaction Details screen for a template are the same as they are for a transaction. Remember, the settings used here apply to all transactions that use the template. So, only apply the settings that will not change.

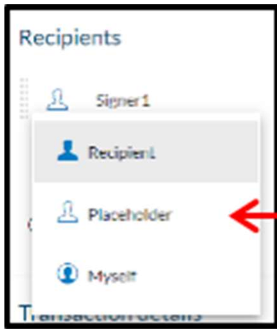
If you want to share this template with other users who are part of your agency's account, toggle on the share template button.



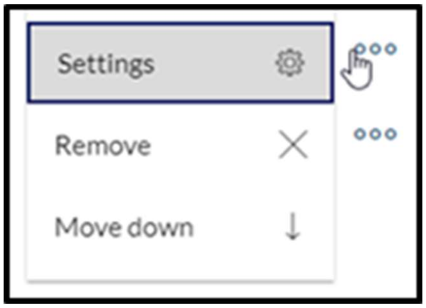
Adding Documents and Recipients to a Template

Add any transaction documents that will always be exactly the same. For example, an informational document that is included in the transaction, or a blank form that the recipient will fill in. If the documents used in the transactions will always be unique, do not add any documents.

Add any recipients of the transactions who will always be the same person. Do not forget to set the signing order, if needed. The template creator may want to use placeholder recipients if a recipient role will be the same, but the people will be different. For example, if the second recipient will always be 1 of 4 potential analysts, the template creator can insert a placeholder labeled "analyst." Then, when it is time to send a transaction using the template, the sender can change the placeholder to a named recipient who is the correct analyst for the documents to be reviewed and signed.



The template creator may want to configure the recipient settings. For example, use the change signer setting, if the recipient will review the document prior to giving it to the person with authority to sign. If the settings need to be modified, click on the 3 dots on the right of the recipient line.

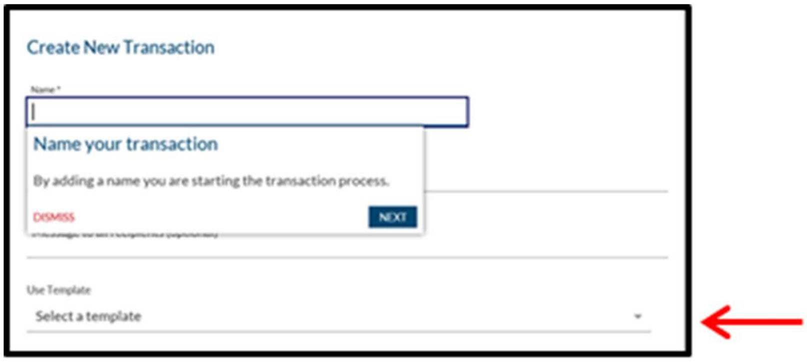


If no documents were added to the template, the template is done. If documents were added, click the next button. The document designer window will open. Apply any signing fields to the document that will be used for all transactions using this template. Text Tags and Layouts are additional features of the eSignature tool that save time. Contact the digital signature help desk at mdot-esign@michigan.gov for more details about these features.

Click the done button to save the template. It will be available in the templates tab of the dashboard, if it needs to be modified.

Applying a Template to a Transaction

Create a new transaction. Before naming the transaction, go to the Use Template field in the Create New Transaction screen, and click the drop-down to see the available templates. Select the needed template.



After the template is applied, modify the transaction name so it is unique. Add the unique documents (if applicable). Add the unique recipients. If there is a placeholder recipient, it will need to be replaced with a named recipient. Modify any unique field settings for the documents in the transaction (if applicable). Send the transaction.